

ALEXANDRIA CONVENTION & VISITORS ASSOCIATION

MOTORCOACH TASK FORCE REPORT

November 2005

Alexandria Convention & Visitors Association
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ALEXANDRIA CONVENTION VISITORS ASSOCIATION
Motorcoach Task Force Members

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Economic Impact Subcommittee

Andrew Palmieri, Chair
Motorcoach Management Subcommittee

Ann Dorman, Chair
Communications Subcommittee

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Mary Ruth Coleman
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Marilee Menard

Randy Julian
Katy Cannady
Peter Kilcullen
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Jim Maslanka
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*not members; attended most meetings
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Support Staff:
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Motorcoach Task Force Final Report November 2005

I. Interim Report presented to City Manager

This report was presented to the City Manager on May 26, 2005. The City Manager requested additional information for City staff comments. See page 5. II. Motorcoach Task Force Final Resolution.

Introduction:

In February 2004, the Alexandria City Council charged the ACVA with the establishment of a Motorcoach Task Force comprising tourism industry officials, local business representatives, and Alexandria residents. The purpose of the Task Force was to develop recommendations to Alexandria City Council and the City Manager for Motorcoach management within the City limits, with a main focus on the Historic District. The goal of the Task Force was to develop suggestions to enhance the economic benefit of motorcoach tours to the City of Alexandria, while minimizing negative impacts on business and residential communities.

The Task Force implemented its mission through two phases:

Phase I – Research: information gathering from tourism professionals, Alexandria businesses and residents, other destinations with motorcoach business; identification of issues of concern.

Phase II – Formulation of solutions, recommendations: study of economic benefits of motorcoach tourism; traffic management of motorcoaches; measurement of impact on the local economy and residential and business communities.

With the two phases of its mission completed, the Motorcoach Task Force presents this summary report in preparation for a work session with City Council and the City Manager to determine the future direction of Alexandria's motorcoach industry. Areas of specific focus are improved management of the industry in its current configuration, with an emphasis on motorcoach traffic through the Historic District; and strategic direction with regard to a growth/no growth policy.

The Task Force looks to City Council to lead this discussion and to direct City staff with the responsibility and the authority to implement the recommendations and solutions that are jointly adopted by Council and the Task Force.

Task Force Findings

Economic Impact:

- The Motorcoach Task Force took a conservative approach to developing economic impact figures. Through its research, the Task Force determined that the motorcoach industry currently contributes approximately \$17 million in revenues annually to the City of Alexandria.
- The motorcoach tour business greatly supports particular segments of the industry that are important to the character of the City as a tourism destination. These segments include Alexandria's popular walking and boating tour companies; historic sites and attractions; a number of Alexandria restaurants; and weekend business at Alexandria hotels. Motorcoach tours provide the major income to many of these businesses, which, in turn, contribute taxes to the City.
- A loss of motorcoach tour business could, in many instances, contribute to the demise of some of Alexandria's most notable tourism experiences, and adversely affect other businesses that depend on the tours to fill what are otherwise slow periods. Conversely, an increase in motorcoach tour business would financially benefit these small businesses directly, as well as the City as a whole.

Cultural Benefits:

In addition to contributing financially to important segments of Alexandria's tourism industry, motorcoach tours provide several less tangible but equally important benefits:

- Motorcoach tours are an excellent way to introduce groups of visitors (45-55 people per motorcoach) to Alexandria.
- Motorcoach tours provide an opportunity for specific segments of the population, such as students and seniors, to experience history firsthand.
- Because of Alexandria's important role in our nation's history, in a sense, every American shares our heritage. For those of us who are fortunate enough to live here, there is some obligation to share our sense of history with others.

Management of Motorcoaches:

The Task Force met with residents and civic association leaders in the Historic District and with motorcoach operators and tour professionals to identify the most frequently mentioned issues shared by both.

The Task Force then conducted extensive hands-on research of possible loading/unloading areas; parking areas with amenities; and routes through the City that minimize disturbance to neighborhoods.

The Task Force reached agreement on the following issues and request that immediate action be taken to resolve the issues.

- Short-term and overnight parking location(s) are woefully inadequate to handle the existing motorcoach business.
- Loading/unloading locations for motorcoaches need to be reviewed to determine if the locations meet the need of the motorcoach visitors.
- Narrow turn radii on specific neighborhood streets in Old Town may require removal of parking spaces near corners or other remedies.
- Signage for parking and loading/unloading is inadequate.
- Current City ordinance dealing with the motorcoach industry needs revision.
- Specific regulations for idling should be set out in ordinance and aggressively enforced.
- Motorcoaches that stop in Alexandria bring in direct revenue and are viewed as positive by the Task Force members.

With careful planning and revision of current guidelines, the Task Force believes the adverse impact of Alexandria's current motorcoach industry to Alexandria's business and residential communities can be ameliorated.

The Task Force was unable to reach unanimous agreement on the following.

- While the Motorcoach Management Subcommittee recommended a restricted motorcoach route to the Task Force, the majority of the Task Force members believed designated routes would cause congestion on those streets that were so designated. If Council desires some form of limitation on the routes used by motorcoaches in the historic district, further examination of reasonable street

designations would be required, provided that such designations are not unduly burdensome and do not result in a negative impact on traffic patterns.

- The majority of the Task Force understood the intrinsic value of drive-through motorcoaches; however, a few questioned the value of drive-throughs compared with the adverse affect on the community.
- One task force member supported a requirement to have motorcoaches register when arriving in the City in order to better manage the flow of traffic.

If City Council considers the motorcoach business an important contributor to the economy of the City of Alexandria, then we request you consider the following:

Immediate Concern–

Could minor adjustments to the existing motorcoach amenities meet the needs of the existing motorcoach business and alleviate the adverse impact on business and residential areas of the City? The Task Force asks that City Council instruct top City staff to work aggressively with the Motorcoach Task Force to implement solutions to the most frequently mentioned issues of the motorcoach operators and residents (see above).

Are funds available to assist in finding reasonable solutions to the issues?

Long-Term Solution –

No Growth: City Council takes a “no growth” approach to Alexandria’s motorcoach industry. The ACVA will not aggressively market to this industry, thereby forgoing any economic benefits from future expansion of motorcoach tourism; however, one can assume there will be at least modest growth even with no additional marketing resources.

Strategic Growth: If City Council wishes to increase the contribution of the motorcoach industry to the City of Alexandria, then Council will need to direct the ACVA to aggressively market to capture a large percentage of the burgeoning motorcoach industry. This implies that the Council is committed to finding a long-term solution to providing parking and other reasonable amenities to the motorcoaches who visit the City. What financial and staff resources will be made available for this long term solution?

Whatever future direction City Council determines is appropriate, the Motorcoach Task Force will work with City staff to develop management guidelines and services needed to better serve both the industry and the citizens of Alexandria.

II. Motorcoach Task Force Final Resolution

At the City Manager's May 26 request on, a list of 17 potential motorcoach parking locations was sent to City staff for their comments. After review of the City staff comments, suggested parking locations were presented to the full Task Force on September 29, 2005.

The Task Force after careful review and a lengthy discussion determined that the proposed parking locations did not provide proper management of motorcoaches and would cause additional adverse effects on the residential neighborhoods.

Upon a motion made by Agnes Artemel and seconded by Marilee Menard, the Motorcoach Task Force unanimously adopted the following and requested a meeting with the City Manager to discuss this report.

The Task Force recognizes the importance of the motorcoach industry to tourism and tourism's importance to the economy of the City of Alexandria. In view of those facts, the Task Force urges the City to identify and pursue a suitable location for a consolidated motorcoach facility that can properly accommodate the coaches and their drivers. For a temporary solution, the City should consider providing parking at the City-owned site formerly occupied by the Datatel Building or negotiating an agreement with the proper entities to allow for motorcoach parking at Potowmack Landing (Washington Sailing Marina) south parking lot, Potomac Yards retail center, and/or the George Washington Masonic Temple (overnight parking only.) The City should immediately begin planning for a long-term solution to parking motorcoaches.

Explanation of general discussion –

The Task Force considered and rejected all 17 parking locations spread through the Old Town area as inappropriate. Scattered motorcoach parking around the city will lead to confusion, create management headaches directing drivers to vacant spaces, eliminate much needed residential and business parking spaces, cause more traffic congestion and negatively affect the local residential communities.

The Task Force wishes to express the angst voiced by both residents and businesses over the lack of adequate parking facilities and services for the motorcoaches. The Task Force urges the City staff and Council to adopt a reasonable temporary and long-term solution to alleviate the tension that is caused by not having a coordinated program in place.

Attachment: Economic Impact Committee Report presented March 31, 2005, to the Motorcoach Task Force.

**Motorcoach Task Force
Economic Impact Committee Report
March 31, 2005**

Objectives:

The Economic Impact Committee of the Motorcoach Task Force was charged with the following objectives:

- Determine and evaluate the economic benefit of motorcoaches currently traveling through/stopping in Alexandria
- Estimate possible economic benefit, should the City decide to increase marketing efforts to this industry, thereby growing the motorcoach business in Alexandria

Strategy:

- Obtain available economic data from Alexandria's current motorcoach industry
- Evaluate economic and cultural benefit of the industry as it currently exists
- Study the motorcoach industries of other similar types of destinations and/or neighboring destinations to determine commonalities and formulas for estimating the economic impact of growing Alexandria's motorcoach industry

Actions:

In order to accomplish its objectives, the committee completed the following research:

- Reviewed motorcoach studies of Chicago (Chicago CVB and ABA Foundation Study) and Washington, DC as reference for analyzing and evaluating Alexandria's motorcoach industry (see results - chart #1).
- Surveyed the following to determine the number of visitors coming via motorcoach to Alexandria, and thereby estimate the size of Alexandria's motorcoach industry:
 - United Motorcoach Association
 - The National Tour Association
 - Guild of Professional Tour Guides of Washington, DC
 - Gold Line/Gray Line
 - Alexandria hotels
 - ACVA's in-house database of tour operators
- Additionally, Ramsay House Visitors Center staff survey visitors coming into the Visitors Center
- Obtained data from the Parter International Alexandria Visitors Center Report
- Estimated the economic impact for seven possible scenarios of individual motorcoach visitors (see chart # 2)

Results:

Economic Impact of Alexandria's current motorcoach industry:

The Committee determined early in its study that it would take a conservative approach to developing economic impact figures. Therefore, the figures presented in this report should be considered low estimates.

- The Committee's research shows that the motorcoach industry currently contributes approximately \$17 million in revenues to the City of Alexandria. Unlike large Cities that derive significant revenues from the motorcoach industry, Alexandria's lack of available space prevents it from providing the services that are revenue generating. To capture the full benefit of the motorcoach industry, Alexandria would need to offer cleaning and maintenance, fuel stations, temporary personnel which would include payroll expenses, and housing for the drivers. Therefore, the \$17 million only takes into account the expenditures of the motorcoach riders.
- A single motorcoach staying two hours in Old Town generates \$544 in direct spending on meals and retail goods; a motorcoach staying four to five hours generates \$1316. A single motorcoach staying overnight generates \$6159 per night.
- The motorcoach tour business greatly supports particular segments of the industry which are important to the character of the City as a tourism destination. These segments include Alexandria's popular walking and boat tour companies; historic sites and attractions; a number of Alexandria restaurants; and weekend business at Alexandria hotels. Motorcoach tours provide the major income to many of these businesses, which, in turn, contribute taxes to the City.
- A loss of motorcoach tour business could, in many instances, contribute to the demise of some of Alexandria's most notable tourism experiences, and adversely affect other businesses who depend on the tours to fill what are otherwise slow periods. Conversely, an increase in motorcoach tour business would financially benefit these small businesses directly, as well as the City as a whole.

Cultural benefits of Alexandria's current motorcoach industry:

In addition to contributing financially to important segments of Alexandria's tourism industry, motorcoach tours provide several less tangible but equally important benefits:

- Motorcoach tours are an excellent way to introduce groups of visitors (45-55 people per motorcoach) to Alexandria. Research tells us that 76% of people who visit Alexandria are likely to return. Because 46% of visitors hear about Alexandria from family or friends, the personal referrals generated by these visitors are invaluable to future visitation.
- Motorcoach tours provide an opportunity for groups, such as students and seniors, to experience history first hand. Alexandria's role in the early stages of our Country's democracy provides a unique experience for any cultural or heritage

traveler. For many students and seniors, in particular, motorcoach is the practical and preferred method of travel.

- Every American shares our heritage. Because of Alexandria's important role in our nation's history, in a sense, Alexandria belongs to the American people. For those of us who choose to live here, this fact should be taken into account.

Adverse impact of Alexandria's current motorcoach industry:

The committee's research indicates the following issues are most frequently mentioned by individual residents:

- Proper parking; loading/unloading of motorcoaches
- Narrow turn radius on specific neighborhood streets in Old Town
- Lack of enforcement of idling and other requirements
- Inadequate signage
- Outdated City ordinances dealing with the motorcoach industry

It should be noted that motorcoach operators and owners surveyed agree that these are concerns that they share.

Conclusions:

- With careful planning and revision of current guidelines, the adverse impact of Alexandria's current motorcoach industry to Alexandria's business and residential communities can be ameliorated.

Future Direction:

The Economic Impact Committee poses these questions for the Task Force's consideration:

- Would an aggressive marketing campaign to the motorcoach industry, which would significantly increase the economic contribution of motorcoaches, provide benefits that outweigh the cost of infrastructure needed to service such an industry?
- Could minor adjustments to and enforcement of the existing motorcoach ordinance meet the needs of the existing industry and alleviate the perceived impact on business and residential areas of the City?

The Economic Impact Committee recommends that the Task Force review these issues to determine the future direction of Alexandria's motorcoach industry that will better serve both the industry and the citizens of Alexandria.

Fiscal Impact of Motorcoach Tours on Alexandria

	Meals	Lodging	Retail Sales	Total
Case 1	\$56,250	\$308,781	\$60,000	\$425,031
Case 2 lunch	\$185,000	\$92,634	\$25,040	\$302,674
Case 2 shop	\$154,770	\$295,313	\$454,688	\$904,770
Case 3	\$684,375	\$196,875	\$206,875	\$1,088,125
Case 4 lunch	\$552,300	\$94,500	\$8,400	\$655,200
Case 4 dinner	\$1,263,525	\$114,750	\$10,200	\$1,388,475
Case 5	\$622,200	\$36,000	\$214,800	\$873,000
Case 6	\$3,627,656	\$5,298,582	\$1,069,430	\$9,995,668
Case 7	\$586,170	\$731,016	\$204,516	\$1,521,702
				\$17,154,646
Total	\$7,732,246	\$7,168,451	\$2,253,949	\$17,154,646
Times tax rate	0.03	0.055	0.01	
Revenue to City from Coach Tour	\$231,967	\$394,265	\$22,539	\$648,772
City total tax revenues, CY2004	\$9,183,887	\$6,739,606	\$21,874,254	\$37,797,747
% of category due to coaches	2.53%	5.85%	0.10%	1.72%

Economic Analysis of Motorcoach Tours

Case 1: Drive Through, No Stops. Economic Benefit Due to Return Business

	Case 1	Table Notes
Direct Expenditures		
Number of passengers having lunch	0	
Times average lunch check	\$12	casual family lunch
= lunch expenditures	\$0	
Number of passengers having dinner	0	
Times average dinner check	\$0	
= dinner expenditures	\$0	
Number of passengers having refreshments	0	
Times average refreshments check	\$0	
= refreshments expenditures	\$0	
Number of passengers shopping	0	
times average shopping expenditure	\$0	
= shopping expenditure	\$0	
Number of hotel rooms paid for	0	
Times average room rate	\$99	average of motorcoach tour room
= hotel expenditure	\$0	
Total expenditures per coach	\$0	
Times number of coaches per year	1250	
Total Direct Expenditures	\$0	
Indirect Expenditures		
<i>repeat business</i>		
Average number returning later to Alexandria*	8	4% of passengers + family
expenditure per person	\$43	1/2 make day trip with lunch;
total expenditures	\$340	1/2 are overnight visitors
Total Indirect Expenditures	\$340	
Total Expenditures	\$340	
Times Number of coaches Per Year	1250	5000 at Mt. Vernon times 25%
Expenditures of all passengers in case 1	\$425,000	
Notes:		
<i>Assumes a 45-person average load</i>		
<i>Drive through only on Washington Street; Drive through historic district with tour narration</i>		
<i>*includes individuals from tour plus family members</i>		

Economic Analysis of Motorcoach Tours

Case 2: Tour spends two hours in Alexandria; Either meal or shopping, not both

	Case 2 - Meal	Case 2 - Shop	Table Notes
Direct Expenditures			
Number of passengers having lunch	45	0	
Times average lunch check	\$12	\$12	casual 45 minute to one hour lunch
=lunch expenditures	\$544	\$0	
Number of passengers having dinner	0	0	
Times average dinner check	\$0	\$0	
=dinner expenditures	\$0	\$0	
Number of passengers having refreshments	0	45	
Times average check	\$0	\$3	coffee or soda average
= refreshments expenditures	\$0	\$135	
Number of passengers shopping	0	45	
times average shopping expenditure	\$0	\$9	not all shop, avg over whole bus
= shopping expenditure	\$0	\$405	
Number of hotel rooms paid for	0	0	
Times average room rate	\$99	\$99	
= hotel expenditure	\$0	\$0	
Total expenditures per coach	\$544	\$540	
Times number of coaches per year	312.5	937.5	Mt Vernon 5000 times 25%
Total Direct Expenditures	\$170,016	\$506,250	25% eat, 75% shop
Indirect Expenditures			
repeat business			as in case 1
Average number returning later to Alexandria*	10	10	
expenditure per person	\$43	\$43	
total expenditures	\$425	\$425	
times number of coaches	312.5	937.5	
Total Indirect Expenditures	\$132,813	\$398,438	
Total Expenditures	\$302,828	\$904,688	

Notes:

Assumes a 45-person average load

*includes individuals from tour plus family members

Economic Analysis of Motorcoach Tours

Case 3: Tour Spends 4-5 hours in Alexandria including one restaurant meal and two hours shopping time

	Case 3	Table Notes
Direct Expenditures		
Number of passengers having lunch	45	
Times average lunch check	\$20	
= lunch expenditures	\$900	
Number of passengers having dinner	0	
Times average dinner check	\$0	
= dinner expenditures	\$0	
Number of passengers having refreshments	45	
Times average check	\$3	coffee or soda average
= refreshments expenditures	\$135	
Number of passengers shopping	11.25	45 people times 25% make purchases
times average shopping expenditure	\$25	older group spends more per person
= shopping expenditure	\$281	
Number of hotel rooms paid for	0	
Times average room rate	\$99	
= hotel expenditure	\$0	
Total expenditures per coach	\$1,316	
Times number of coaches per year	625	
Total Direct Expenditures	\$822,656	
Indirect Expenditures		
<i>repeat business</i>		
Average number returning later to Alexandria*	10	
expenditure per person	\$43	
total expenditures	\$425	
times number of coaches per year	625	
Total Indirect Expenditures	\$265,625	
Total Expenditures	\$1,088,281	
Notes:		
<i>Assumes a 45-person average load</i>		
*includes individuals from tour plus family members		

Economic Analysis of Motorcoach Tours

Case 4: Tour is in Alexandria Primarily for Dining Cruise (Dandy or Potomac Riverboat)

Case 4--Lunch Case 4--Dinner Table Notes

Direct Expenditures

Number of passengers having lunch	45	0
Times average lunch check	\$26	\$26 average of 2 operators
=lunch expenditures	\$1,170	\$0
Number of passengers having dinner	0	45
Times average dinner check	\$50	\$50 average of 2 operators
=dinner expenditures	\$0	\$2,250
Number of passengers having refreshments	45	45
Times average check	\$8	\$15 bar/drinks
= refreshments expenditures	\$360	\$675
Number of passengers shopping	0	0
times average shopping expenditure	\$0	\$0
= shopping expenditure	\$0	\$0
Number of hotel rooms paid for	0	0
Times average room rate	\$99	\$99
= hotel expenditure	\$0	\$0
Total expenditures per coach -- lunch cruise	\$1,530	\$0
Total expenditures per coach -- dinner cruise	\$0	\$2,925
Times number of coaches per year-- lunch cruise	350	0
Times number of coaches per year -- dinner cruise	0	425
Total expenditures -- dinner cruise	0	\$1,243,125
Total expenditures -- lunch cruise	\$535,500	\$0
Total Direct Expenditures	\$535,500	\$1,243,125

Indirect Expenditures

repeat business

Average number returning later to Alexandria*	8	8
expenditure per person	\$43	\$43
total expenditures per coach	\$340	\$340
times number of coach	350	425
Total Indirect Expenditures	\$119,000	\$144,500

Total Expenditures	\$654,500	\$1,387,625
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Notes:

Assumes a 45-person average load

*includes individuals from tour plus family members

Economic Analysis of Motorcoach Tours

Case 5: Tour has Alexandria as Destination; Passengers spend full day in town

	Case 5	Table Notes
Direct Expenditures		
Number of passengers having lunch	45	
Times average lunch check	\$18	older group, restaurant lunch
= lunch expenditures	\$810	
Number of passengers having dinner	45	
Times average dinner check	\$45	older group, nice dinner
= dinner expenditures	\$2,025	
Number of passengers having refreshments	30	
Times average check	\$8	drink plus pastry/snack
= refreshment expenditures	\$240	
Number of passengers shopping	30	
times average shopping expenditure	\$35	good shoppers!
= shopping expenditure	\$1,050	
Number of hotel rooms paid for	0	
Times average room rate	\$99	
= hotel expenditure	\$0	
Total expenditures per coach	\$4,125	
Times number of coaches per year	200	
Total Direct Expenditures	\$825,000	
Indirect Expenditures		
<i>repeat business</i>		
Average number returning later to Alexandria*	6	
expenditure per person	\$43	
total expenditures	\$255	
times number of coaches per year	200	
Total Indirect Expenditures	\$51,000	
Total Expenditures	\$876,000	
Notes:		
Assumes a 45-person average load		
*includes individuals from tour plus family members		

Case 6: Tour Stays Two Nights in Alexandria Hotel; one lunch and two dinners in town

	Case 6	Table Notes
Direct Expenditures		retired or "romantic weekend" couple:
Number of passengers having lunch	45	
Times average lunch check	\$18	
=lunch expenditures	\$810	
Number of passengers having dinner	90	
Times average dinner check	\$30	
=dinner expenditures	\$2,700	
Number of passengers having refreshments	60	all one day, half the second
Times average check	\$6	
= refreshments expenditures	\$360	
Number of passengers shopping	45	
times average shopping expenditure	\$25	
= shopping expenditure	\$1,125	
Number of hotel rooms paid for	56	some are couples; 2 nights
Times average room rate	\$99	survey of ten Alexandria hotels, weighted average
= hotel expenditure	\$5,533	
Total expenditures per coach	\$10,528	
Times number of coaches per year	934	
Total Direct Expenditures	\$9,833,488	
Indirect Expenditures		
<i>repeat business</i>		
Average number returning later to Alexandria*	4	
expenditure per person	\$43	
total expenditures	\$170	
times number of coaches	934	
Total Indirect Expenditures	\$158,780	
Total Expenditures	\$9,992,268	
Notes:		
Assumes a 45-person average load		
*includes individuals from tour plus family members		

Case7: Tour Stays One Night in Alexandria Hotel; one dinner in town

	Case 7	Table Notes
Direct Expenditures		
Number of passengers having lunch	45	
Times average lunch check	\$18	
=lunch expenditures	\$810	
Number of passengers having dinner	45	
Times average dinner check	\$30	
=dinner expenditures	\$1,350	
Number of passengers having refreshments	45	
Times average check	\$5	lower than case 6, they don't have as much time
= refreshments expenditures	\$225	
Number of passengers shopping	45	
times average shopping expenditure	\$18	lower than case 6, they don't have as much time
= shopping expenditure	\$810	
Number of hotel rooms paid for	30	some passengers are couples or share a room
Times average room rate	\$99	weighted average based on survey of ten Alexandria hotels
= hotel expenditure	\$2,964	
Total expenditures per coach	\$6,159	
Times number of coaches per year	234	
Total Direct Expenditures	\$1,441,276	
Indirect Expenditures		
<i>repeat business</i>		
Average number returning later to Alexandria*	8	
expenditure per person	\$43	
total expenditures	\$340	
times number of coaches	234	
Total Indirect Expenditures	\$79,560	
Total Expenditures	\$1,520,836	

Notes:

Assumes a 45-person average load

*includes individuals from tour plus family members

